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Research Report

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

WOMEN AND FASHION:

1981 Study of Clothes Buying Attitudes and Behavior

DECEMBER, 1981

NEWSPAPER ADVERTISING BUREAU PROJECT

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

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INTRODUCTION

Background and Purpose

In 1971 and again in 1979 the Newspaper Advertising Bureau conducted a national study of American women's attitudes and values, their consumer behavior, and their attitudes toward advertising and the media. By repeating many of the questions asked in the earlier study, the '79 study tracked some major changes in social values, consumer behavior and attitudes that had accompanied the dramatic entry of women into the work force in the decade of the 70's.

The fashion-related items in these studies included questions on images of the working woman and the full-time housewife, their clothes shopping patterns and their attitudes toward the fashion content of newspapers.

The present study was undertaken to up-date where women are now buying clothes, and to provide more detailed information about consumer behavior and attitudes of specific interest of women's fashion retailers and advertisers.

Study Description

In telephone interviews with a national sample of 501 women conducted by the ORC Caravan Express during the week of October 11-20, 1981, women were asked again where they had bought their last dress. This time they were also asked where they had bought their last separates. The new questions in this study focussed on their images of different types of retail stores, some aspects of their attitudes toward fashion, and the role of the media in informing the consumer about fashion, about where to shop, and in stimulating unplanned buying.

HIGHLIGHTS

Where They Buy

- Specialty stores are now more popular than department stores for dresses and separates. Half the women had bought one or both of these items in specialty stores, compared with 39% who had bought one or both in department stores, 24% in a national chain store, and 16% in a discount store.

- Specialty stores are most favored by younger and single women for dresses as well as separates.

- High income and professional/managerial women are evenly divided between department stores and specialty stores for dresses and separates. White collar women buy their dresses in the same general types of stores patronized by professional women but in buying separates they are somewhat less inclined to patronize department stores and somewhat more inclined to patronize discount stores. Blue collar women are the least likely to buy dresses or separates in department stores and the most likely to buy in discount stores.

- National chains and specialty stores are patronized fairly uniformly across occupational levels. Discount stores, expectably, are patronized most often by blue collar women.

- Specialty stores are patronized by one-third of the women in non-metro as well as metro areas. Department stores were more heavily patronized in larger cities than in smaller cities or non-metro areas. National chains did better in non-metro areas for separates.

Consumer Judgments of Different Types of Stores

- Department stores are ranked as best performers on four of the nine measures the consumer was asked to consider: they are seen as having the largest selection of clothes, as having the kind of clothes these women like to wear, as being the easiest to shop in, and as having the clothes arranged most conveniently.

- Specialty stores tie with department stores on three of the measures: on having clothes arranged most attractively, on having the most up-to-date fashions, and on having the highest quality of merchandise.

- Specialty stores outrank department stores on the quality of the sales help, which is one of the most attractive features of specialty stores.

- National chains are about tied with department stores on providing best value, which is a dimension that specialty stores do not qualify on. National chains are second to department stores for having the largest selection and having clothes arranged most conveniently. And they are close to specialty stores with regard to having the kind of clothes these women like to wear and being easiest to shop in. Altogether, the national chain store was ranked best on the various measures by between 21% and 35% of the women.

- The leading feature of discount stores was, as might be expected, "best value for the money" for which they ranked slightly ahead of specialty stores, but not as high as department stores and national chains.

- In general women tend to see the kind of stores in which they shop in a better light than they see other stores. But in some respects they are clearly prepared to make trade-offs. For example, specialty store customers know they are sacrificing value for the money and size of selection for service, attractive arrangement of the clothes, up-to-date fashions, and quality of clothes. And department store customers do not think of the sales help as a strong suit of department stores.

- In fact the single greatest source of dissatisfaction with department stores is the quality of the sales service. When asked what department stores should do to make it easier for them to shop there, almost one woman in three, of those who made suggestions, asked for improvement in the quality of the service. And 13% of the suggestions had to do with difficulty in finding the sizes or categories of merchandise they are looking for, a problem which is aggravated by the decline in service. If we add requests that whole departments be more clearly identified, this figure rises to one fifth of the suggestions.

Fashion Reputation of Store vs. Name of Designer or Manufacturer

- When asked which was more important when buying good clothes for herself, 22% said "neither." Older, better educated women were more likely to say "neither." Among those who acknowledged the fashion authority of one or the other, women who shop in department or specialty stores were evenly divided between store and designer. Chain store and discount store customers were somewhat more concerned with the fashion reputation of the store, which is understandable since presumably these women are not likely to buy in a price range which would carry known designer or manufacturer lebels.

One Classic Outfit

- The vast majority of women (72%) said they would prefer to buy one classic outfit rather than two or three outfits in the latest styles. The appeal of latest styles was concentrated among women who were 18-24.

Role of the Media

- What's in fashion? Newspapers are almost as important as magazines, a conventional source of fashion news, for finding out what's in fashion.

- Where to shop? Newspaper advertising takes a strong lead over the other media in being most helpful on where to shop. Among the four media, 63% chose newspapers, 20% magazines, 14% television, and 3% radio.

- Unplanned buying: More than half of the women said they had seen ads which had led them to buy clothes even though they weren't planning to. And in seven out of ten of these purchases it was a newspaper ad which had led to the unplanned purchase.

WHERE THEY BUY

Where did women make their most recent dress and separates purchase?

There are various indications that specialty stores have recently pulled ahead of department stores as the place women buy their dresses. In 1979 department stores were in the forefront for dresses, according to two consumer studies which asked about their most recent purchase: a national survey conducted for the Newspaper Advertising Bureau by the Response Analysis Corporation of Princeton,[1] and a survey conducted for Fairchild Publications by the Home Testing Institute.[2] But by 1981 department stores had dropped out of the leadership position.

Table 1.

Where Most Recent Dress Was Bought, 1979 and 1981

	1979		1981	
	Fairchild	NAB	NAB[3]	NRCA[4]
Department store	36	39	29	28
Specialty store	31	29	34	33
National chain store	17	13	15	13
Discount store	9	10	9	16
Other	5	1	7	11
Don't know/no answer	4	8	6	

1) Women, Work and Markets of the '80s, Newspaper Advertising Bureau, 1979. This study was conducted by personal interview with a national probability sample of 1,041 women, aged 18 and over.

2) The Customer Speaks, 1980, Fairchild Fact File. This study was conducted by questionnaires mailed to 3,500 women 18-64 in households with incomes of $15,000 and over. These women are members of the Home Testing Institute National Consumer Panel. An additional sample of single women households with incomes down to $10,000 was also included. Responses were received from 2,600 women.

3) As noted in the introduction, this study was conducted by telephone interviews with a national probability sample of 501 women aged 18 and over by the Opinion Research Corporation Caravan Express.

4) Cited in Chain Store Age, March 1981.

In the present study more women reported buying dresses and separates in specialty stores than in department stores: half had bought at least one of these items in a specialty store, compared with 39% who bought in a department store, 24% in a national chain store and 16% in a discount store (columnn 3 below). These rankings are the same for both types of items, though the percentages are somewhat lower for each (columns 1 and 2). Nor do department stores outrank specialty stores among those who may be called "habitual" customers -- the 48% who bought dress and separates in the same type of store (column 4 below).

Table 2.

Where Most Recent Purchases Were Made (1981)

	(1) Dress	(2) Separates	(3) Net, one or both items	(4) Both items in same type of store
Department store	29%	26%	39%	15%
Specialty store	34	35	50	19
National chain store	15	16	24	6
Discount store	9	12	16	5
Other (rummage, dressmaker, etc.)	7	7	a)	3
Don't know, no answer	6	4	a)	a)
	100%	100%	b)	48%
Bases:	(501)	(501)	(501)	(501)

a) Net figures not tabulated.

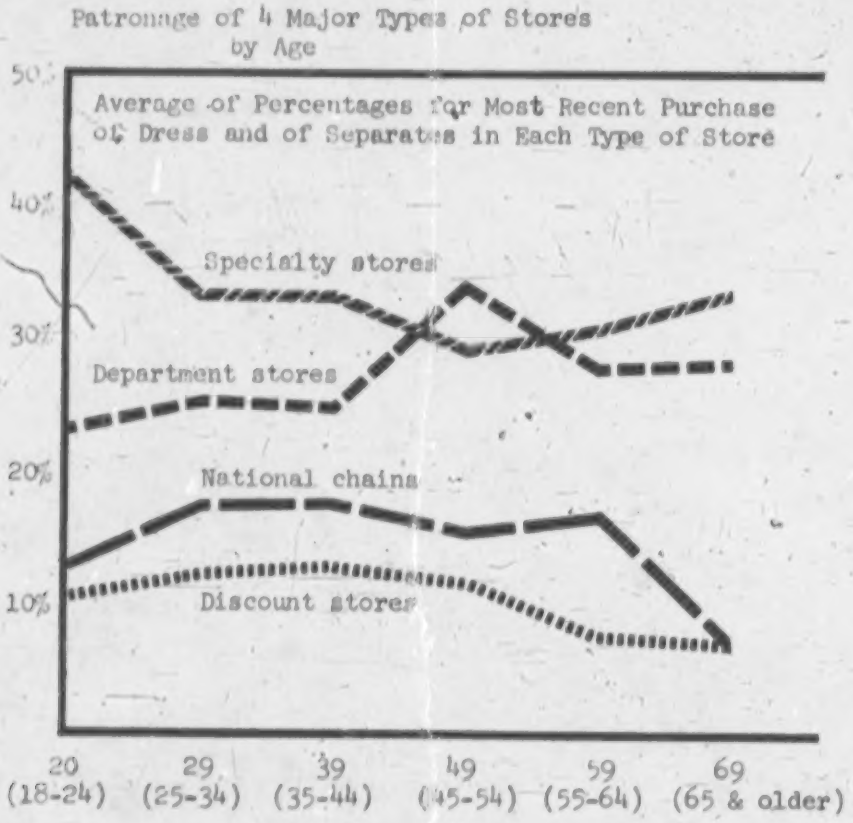
b) Total exceeds 100% because women who bought the two kinds of items in different types of stores appear in both types of stores.

QUESTION: "Where did you buy your last dress? (What was the name of the store?)"

"Where did you buy your last separates, like jacket, skirt or pants? (What was the name of the store?)"

Who Buys Where

Age: Younger women (18-24) show a greater relative preference for specialty stores over department stores, for dresses as well as separates. But the relative positions of department stores and specialty stores, for dresses and for separates, shift from one age group to the next. (See Appendix for detailed tables.) The rise and fall of each type of store in successive age groups can be seen in the chart below which plots the averages of dress and separates purchasing for each type of store. Specialty stores outrank department stores among women under 45; national chain and discount store patronage are quite level across age groups; buying in discount stores appears to slack off somewhat earlier (around the age of 50) than in the national chains (around the age of 60).



If we compare dress buying in '81 with dress buying in '79 in three broader age categories which flatten out the rise and fall in the narrower age categories, it would appear that whereas department stores have become less popular at all ages, specialty stores have become more popular among women in the middle group (between 35 and the early fifties.)

Table 3.

Most Recent Dress Purchase
By Age (1979, 1981)

	18-34		35-54 ('81) 35-49 ('79)		55+ ('81) 50+ ('79)	
	'79	'81	'79	'81	'79	'81
Department store	37	28	39	27	42	30
Specialty store	33	36	26	38	27	29
National chain	12	16	13	13	13	14
Discount store	12	9	13	12	6	6
Other, don't know	6	11	9	10	12	21
Bases:	(431)	(186)	(300)	(171)	(293)	(136)

Note: Comparable figures not available for separates because the '79 study asked about coats.

Marital Status: Given the preference of younger women for specialty stores, it is no surprise to find that specialty stores are more favored by single women than by other women for dresses and for separates; approximately half made their purchases in a specialty store compared with one-third of other women. This does not mean that they were less likely than other women to have bought these items in department stores, since one in four, like the other women, had done so. Rather, it would appear that the national chains, discount stores, and other sources are less popular with single women.

Table 4.

Most Recent Purchase of Dress and Soparates
By Marital Status

	Single	Now or Formerly Married
Last Dress		
Department store	27%	28%
Specialty store	46	32
National chain	9	16
Discount store	6	10
Other	4	8
Don't know	7	6
Last-Separates		
Department store	25%	26
Specialty store	52	32
National chain	12	17
Discount store	4	13
Other	4	9
Don't know	3	3
Bases:	(67)	(433)

Occupation and Income: The general types of stores women made their recent purchases in are quite similar for those who are employed and those who are not, but they do vary with occupational level and income level. (See Table 5.)

High income and professional/managerial women are evenly divided between department stores and specialty stores for both dresses and separates. Blue collar women are least likely to use department stores and they make a higher percentage of their purchases in discount stores than other women.

White collar women resemble professional women in the general types of stores in which they buy dresses, but in buying separates the percentages who patronized department stores and discount stores fall between professional women and blue collar women. That is, the buying of separates in department stores and discount stores proceeds in opposite directions on the continuum from professional women to white collar women to blue collar women. But specialty and national chains had fairly uniform patronage for dresses and separates across occupational lines.

Table 5.

Most Recent Purchase by Occupation and by Income

	Employment Status		Occupation			Household Income			
	Employed	Not Employed	Prof/ Mng.	White Collar	Blue Collar	Under $15,000	$15,000-$24,999	$25,000 $34,999	$35,000 or over
Dress Purchase									
Department store	31%	26%	35%	35%	21%	28%	28%	22%	40%
Specialty store	36	32	37	35	35	23	34	45	37
National chain	13	17	13	11	16	16	20	16	8
Discount store	9	10	6	7	15	12	10	9	6
Other	5	9	4	5	6	13	8	4	4
Don't know	7	6	4	9	7	9	1	4	6
Separates Purchase									
Department store	29%	23%	37%	29%	18%	23%	21%	29%	38%
Specialty store	36	34	33	40	32	35	31	36	37
National chain	16	17	18	12	19	16	18	17	14
Discount store	11	12	6	12	19	12	18	13	3
Other	5	10	3	4	10	9	8	3	4
Don't know	3	4	2	4	1	4	5	2	5
Bases:	(270)	(230)	(94)	(104)	(66)	(141)	(115)	(96)	(63)

Note: Percentages do not always add to 100 because of rounding.

City Size: Specialty stores were patronized by one-third of the women in non-metro as well as metro areas. Department stores were more heavily patronized in larger than in smaller cities. National chains did better in non-metro areas for separates. Discount stores too did somewhat better there than in large metropolitan areas for the purchase of separates.

Table 6.

Most Recent Purchase of Dress and Separates by City Size

	Non-metro	Metro 50,000-999,999	Metro 1,000,000 or over
Last Dress			
Department store	17%	28%	37%
Specialty store	38	34	31
National chain	17	17	11
Discount store	10	7	9
Other	10	7	5
Don't know	8	5	6
Last Separates			
Department store	13%	28%	34%
Specialty store	34	35	36
National chain	24	14	11
Discount store	15	14	8
Other	11	6	5
Don't know	3	3	5
Bases:	(157)	(134)	(210)

Purchasing patterns appear to be fairly uniform among the four major geographic regions. There are some differences but almost all are within what would be expected by chance, given the sizes of the samples.

To summarize, department stores did best for separates among 45-54 year old women, and for dresses and separates among working women who are professional or managerial; among women in the highest income families; and those living in the larger metro areas. They have fewest customers for both dresses and separates among blue collar women.

Specialty stores are most favored by single women. When dresses and separates are combined, a modest relationship between age and purchasing in specialty stores is apparent: younger women are most likely to buy in specialty stores, those around 50 are least likely, and there is a slight upturn among the older women.

The national chain stores did better among women living in non-metro areas for separates.

CONSUMER JUDGMENTS OF DIFFERENT TYPES OF STORES

Which Types of Stores Perform Best

Regardless of where women had bought their last dress or separates, they were asked which type of store performed best with regard to each of nine measures. The question they were asked was: "Thinking about the different kinds of stores that sell clothes for women, that is, department stores, discount stores, specialty shops, and national chains like Sears, Penney and Ward, which kind of store would you say. . ."

- Has the highest quality of clothes for women?
- Gives the best value in women's clothes for the money?
- Has the largest selection of women's clothes?
- Has the most knowledgeable and helpful salesclerks?
- Has the kind of clothes you like to wear?
- Has the most up-to-date women's fashions?
- Has the women's clothes arranged most attractively?
- Has the women's clothes arranged most conveniently for you?
- Is the easiest kind of store for you to shop in for clothes for yourself?

(To minimize bias, the starting item was rotated when the question was asked.)

Looking first at how the four different kinds of stores share the honors in this cross-section of 500 women (see table on p. 13), department stores hold the highest image on four of the nine measures:

47% said that department stores had the largest selection.
41% said department stores had the kind of clothes they like to wear.
42% said that department stores are the easiest to shop in.
39% said that they have women's clothes arranged most conveniently.

Specialty stores tie with department stores on three of the measures:

	Dept. Stores	Spec. Stores
Clothes arranged most attractively	37%	37%
Most up-to-date fashions	37	36
Highest quality	36	33

and specialty stores out-rank department stores slightly on the quality of their salesclerks (36% vs. 30% for department stores); 16% couldn't choose any type of stores as having the most knowledgeable and helpful salesclerks, which suggests that this is a general source of dissatisfaction.

However, the salesclerk is in fact one of the strongest features of specialty stores. Or to put it another way, whereas department stores received their fewest votes for the quality of their salesclerks, for specialty stores it was one of the top three items (36%), along with the attractiveness of their clothes arrangement (37%) and their up-to-date fashions (36%).

In noting that only 33% gave highest marks to specialty shops for the quality of clothes, it should be remembered that the designation "specialty shop" may cover a much wider price range than department stores. However, they are not seen as providing either the best value or the largest selection; only 10% chose specialty stores for these two items.

Although value for the money was not one of the department stores' strongest features, they are about tied with the national chains on this dimension; 35% said the national chains offered the best value, compared with 32% who said department stores are the ones which do.

National chains also did well -- second to department stores -- on having the largest selection of women's clothes (34%). And it comes as no surprise that the leading feature of discount stores, among the items included, was value for the money (15%).

Table 7.

Store Performance Rankings

Which type of store has.....	Bases	Department Stores	Spec. Stores	Nat'l Chain Stores	Disc. Stores	D.K./ N.A.
		%	%	%	%	%
Highest quality	(501)	36	33	26	2	7
Best value	(501)	32	10	35	15	10
Largest selection	(501)	47	10	34	4	7
Best salesclerks	(501)	30	36	21	2	16
Kind of clothes you like to wear	(501)	41	31	27	6	5
Most up-to-date fashions	(501)	37	36	23	4	8
Clothes arranged most attractively	(501)	37	37	21	2	8
Clothes arranged most conveniently	(501)	39	22	29	7	8
Easiest to shop in	(501)	42	25	26	8	4

Note: Percentages may add across to more than 100 because of multiple responses or rounding.

Customer's Views of the Stores They Purchase in

We have been talking about how all women feel about the four kinds of stores. Let us now look at how customers feel about the stores they shop in. In general, women who shop in a particular kind of store give it higher marks that do women who don't shop in that kind of store. For example, two women out of three (64%) who shop in department stores say they have the largest selection, compared with only one of three (37%) of those who do not shop in department stores.

Table 8.
Performance Ratings of Each Type of Store
By Customers and Non-Customers

	Dept.	Specialty	Nat'l Chain	Discount
Largest Selection				
Customers 1)	64	11	56	14
Not Customers	37	8	26	2
Easiest to shop				
Customers	58	35	47	24
Not Customers	32	14	19	5
Kind of clothes liked				
Customers	57	39	50	13
Not Customers	31	22	20	5
Most conveniently arranged				
Customers	52	30	54	18
Not Customers	30	13	21	5
Most attractively arranged				
Customers	47	43	38	3
Not Customers	30	31	15	1
Most up-to-date fashions				
Customers	48	42	37	9
Not Customers	30	30	18	3
Highest quality				
Customers	50	40	41	3
Not Customers	27	27	20	2
Best Salesclerks				
Customers	38	41	27	1
Not Customers	25	30	20	3
Best Value				
Customers	43	13	54	27
Not Customers	24	6	29	12
Bases : Customers	(197)	(253)	(123)	(80)
Not Customers	(304)	(248)	(378)	(421)

Note: "Customers" are women who bought dress and/or separates in that type of store.

Performance Ratings of all Stores by Customers of Each Kind

But there are some interesting deviations from the rule of seeing the store they shop in as best, mostly on the part of specialty store shoppers. (See table on page 17.) The specialty store customers know that department stores and national chains offer a better value and a larger selection, and they're more inclined to say department stores are best for conveniently arranged clothes and ease of shopping. What the specialty store customer prizes about specialty stores are the attractive arrangement of the clothes (43%), the up-to-date fashions (42%), the quality of the salesclerks (42%), and the quality of the clothes (40%). A large proportion (39%) feel that specialty stores carry the kind of clothes they want to wear, but almost as many (36%), feel that department stores carry their kind of clothes.

Department stores customers see their own type of store in a better light than other stores in every way, with one exception: the quality of their salesclerks. 38% of the department store customers say department stores have the best salesclerks, and 36% say specialty stores do. National chain shoppers are divided among all 3 types of stores on this measure. However, more of the national chain shoppers rate national chain stores higher than other stores on: largest selection, easiest shopping, most conveniently arranged, their kind of clothes, and best value for the money.

As for discount store shoppers, the best they can say for discount stores is that that's where they get the best value for their money (27%); and 24% say that that's where the shopping is easiest. But in every measure they feel that other stores surpass discount stores. For instance, even though "best value" is their highest vote for discount stores (27%), far more of them (40%) say that national chains offer the best value.

Table 9. Performance Ratings of All Types of Stores by Customers for Each Type

Bases:	Total (501) %	Dept. Store Customers* (197) %	Spec. Store Customers* (253) %	Nat'l Chain Customers (123) %	Disc.Store Customers* (80) %
LARGEST SELECTION:					
Dept. stores	47	68	49	22	34
Specialty	10	8	11	9	6
National chain	34	26	31	56	36
Discount	4	1	4	5	14
D.K.	7	3	5	5	10
EASIEST SHOPPING:					
Dept. stores	42	58	40	30	36
Specialty	25	22	35	18	9
National chain	26	18	23	47	29
Discount	8	4	5	8	24
D.K.	4	2	2	2	5
MY KIND OF CLOTHES:					
Dept. stores	41	57	36	33	36
Specialty	31	31	39	19	19
National chain	27	16	28	50	38
Discount	6	3	6	6	13
D.K.	5	3	2	4	8
CONVENIENTLY ARRANGED:					
Dept. stores	39	52	37	19	33
Specialty	22	20	30	16	9
National chain	29	23	25	54	38
Discount	7	5	6	9	18
D.K.	8	4	6	4	10
ATTRACTIVELY ARRANGED:					
Dept. stores	37	47	33	24	36
Specialty	37	37	39	36	33
National chain	21	13	18	38	29
Discount	2	1	1	2	4
D.K.	8	4	8	4	9
UP-TO-DATE FASHIONS:					
Dept. stores	37	48	34	28	31
Specialty	36	35	42	33	31
National chain	23	17	23	32	29
Discount	4	3	5	2	9
D.K.	8	4	5	7	8
HIGHEST QUALITY:					
Dept. stores	36	50	31	32	37
Specialty	33	33	40	26	23
National chain	26	17	25	41	39
Discount	2	2	2	1	4
D.K.	7	4	7	2	9
BEST SALESCLERKS:					
Dept. stores	30	38	30	27	24
Specialty	36	36	41	28	36
National chain	21	16	19	27	30
Discount	2	2	3	2	11
D.K.	16	14	12	16	10
BEST VALUE:					
Dept. stores	32	43	34	22	20
Specialty	10	10	13	4	5
National chain	35	26	32	54	40
Discount	15	15	13	14	27
D.K.	10	10	9	7	8

*"Customers" definition: those who bought dress and/or separates in the specified kind of store. Not mutually exclusive since women may have bought each item in a different store.

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

Performance Ratings by Age

Women of all ages agreed on several of the measures. Thus department stores ranked highest in every age group on having the largest selection and being the easiest kind of store to shop in. And specialty stores were generally chosen more often than department stores as having the best sales-clerks. But on some issues the generations differed.

For women over 35, department stores hold first place for quality, for carrying the kind of clothes they like to wear, for up-to-date fashions, and the attractive arrangement of the merchandise. But younger women -- those who are 25-34 -- give first place to specialty stores on three of these four dimensions (all but "her kind of clothes"). And they are most inclined to attribute "best value for the money" to national chains.

The youngest group, 18-24, also feel that specialty stores arrange merchandise most attractively, but for them specialty stores tie with department tores on up-to-date fashions. And on "highest quality" they are divided among department stores, specialty stores and the national chains. For this youngest group of shoppers the national chains tie with department stores on the convenient arrangement of merchandise, and the national chains are about equal to department stores in carrying the kind of clothes they like to wear.

The implications of these differences are that while it may be said that tastes and standards change as the consumer gets older, the younger women's favorable perceptions of specialty stores and national chains vis-a-vis department stores may well presage a shopping pattern that will persist as they grow older.

Table 10. Performance Ratings By Age

	Total	18-24	25-34	35-44	45-54	55-64	65+
Bases:	(501)	(72)	(114)	(95)	(76)	(81)	(55)
LARGEST SELECTION:	%	%	%	%	%	%	%
Dept. stores	47	49	46	49	47	44	46
Specialty	10	8	15	9	7	5	13
National chain	34	38	35	35	33	35	25
Discount	4	3	4	2	9	6	0
D.K.	7	4	4	5	4	10	16
EASIEST SHOPPING:							
Dept. stores	42	40	39	40	50	35	55
Specialty	25	24	31	24	20	23	24
National chain	26	29	25	26	22	33	15
Discount	8	8	4	11	9	7	5
D.K.	4	4	2	4	1	7	7
HER KIND OF CLOTHES:							
Dept. stores	41	44	32	46	47	35	44
Specialty	31	22	39	25	32	31	33
National chain	27	40	28	25	25	28	16
Discount	6	10	3	6	8	5	5
D.K.	5	1	3	6	0	12	7
CONVENIENTLY ARRANGED:							
Dept. stores	39	39	35	37	50	27	47
Specialty	22	24	28	28	14	21	24
National chain	29	38	29	28	26	33	20
Discount	7	4	9	8	8	7	5
D.K.	8	3	4	8	5	16	9
ATTRACTIVELY ARRANGED:							
Dept. stores	37	26	31	40	46	33	46
Specialty	37	42	48	36	35	30	31
National chain	21	25	17	23	20	30	7
Discount	2	3	1	2	0	2	0
D.K.	8	8	5	5	4	12	16
UP-TO-DATE FASHIONS:							
Dept. stores	37	36	26	42	49	36	33
Specialty	36	36	47	35	34	25	34
National chain	23	26	24	22	18	28	16
Discount	4	3	2	8	4	5	2
D.K.	8	3	4	8	5	14	15
HIGHEST QUALITY:							
Dept. stores	36	31	32	40	38	35	40
Specialty	33	33	43	31	37	23	29
National chain	26	32	27	24	21	28	18
Discount	2	1	1	0	4	4	0
D.K.	7	4	2	8	4	14	15
BEST SALESCLERKS:							
Dept. stores	30	31	28	34	29	30	27
Specialty	36	38	46	39	33	23	29
National chain	21	26	18	20	22	28	15
Discount	2	0	2	1	4	5	2
D.K.	16	7	9	11	16	22	35
BEST VALUE:							
Dept. stores	32	36	25	34	33	28	36
Specialty	10	14	10	6	5	10	18
National chain	35	36	46	29	37	35	22
Discount	15	14	14	23	16	11	7
D.K.	10	4	5	9	9	16	17

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

Performance Ratings by Family Income

On some measures women in all income groups share attitudes toward the different types of stores. Low and high income women tend to agree that department stores provide the easiest shopping, offer the largest selection, have their merchandise arranged most conveniently, and carry the kind of clothes the women like to wear. Specialty stores hold a good image for up-to-date fashions. National chains are well thought of by all as offering the best value for the money. But in other respects women at different income levels hold different views, which in part reflect the kinds of stores they actually shop in.

Among the least affluent (under $15,000) the national chains vie with department stores on several dimensions: highest quality, most up-to-date fashions, and sales help. In the $15,000-$25,000 income group, all three major types of stores tie for quality.

It is among women with family incomes over $35,000 that specialty stores hold the strongest image vis-a-vis department stores, since the national chains do not count for these women except for "best value for the money." For these women specialty stores do noticeably better than department stores on quality and attractive arrangement of clothes. Specialty stores do better among these women than the less affluent on up-to-date fashions and "her" kind of clothes, but department stores too score well on these dimensions among affluent women.

To summarize: Department stores do well among all groups but among the least affluent women the national chains compete for performance ratings. Among middle income groups department stores face competition on performance images from specialty stores and national chains. And among affluent women the department store competes more exclusively with the specialty store.

Ratings of Each Type of Store by Income

Table 11.

	Total	Under $15,000	$15,000-$24,999	$25,000-$34,999	$35,000+
Bases:	(501)	(141)	(118)	(159)	(63)
LARGEST SELECTION:					
Dept. stores	47	46	41	50	59
Specialty	10	7	12	11	10
National chain	34	35	42	33	29
Discount	4	3	3	4	3
D.K.	7	9	3	1	3
EASIEST SHOPPING:					
Dept. stores	42	43	37	41	46
Specialty	25	22	23	27	30
National chain	26	23	31	30	19
Discount	8	8	12	6	6
D.K.	4	7	0	1	3
HER KIND OF CLOTHES:					
Dept. stores	41	40	41	45	38
Specialty	31	24	28	33	43
National chain	27	30	33	27	19
Discount	6	6	10	0	5
D.K.	5	9	0	5	2
CONVENIENTLY ARRANGED:					
Dept. stores	39	37	35	36	46
Specialty	22	19	20	26	32
National chain	29	30	37	29	21
Discount	[illegible]	[illegible]	10	5	10
D.K.	8	10	6	3	3
ATTRACTIVELY ARRANGED:					
Dept. stores	37	35	40	34	33
Specialty	37	33	30	46	51
National chain	21	24	27	18	13
Discount	2	2	2	0	0
D.K.	8	9	7	4	6
UP-TO-DATE FASHIONS:					
Dept. stores	37	30	32	42	43
Specialty	36	33	36	35	32
National chain	23	29	28	24	11
Discount	4	5	3	3	5
D.K.	8	13	4	2	3
HIGHEST QUALITY:					
Dept. stores	36	37	33	39	32
Specialty	33	19	34	40	54
National chain	26	35	31	19	11
Discount	2	2	2	1	2
D.K.	7	9	3	5	8
BEST SALESCLERKS:					
Dept. stores	30	29	29	33	35
Specialty	36	23	35	46	51
National chain	21	27	24	13	16
Discount	2	2	2	3	3
D.K.	16	23	14	8	5
BEST VALUE:					
Dept. stores	32	30	30	35	32
Specialty	10	11	9	10	9
National chain	35	35	37	39	32
Discount	15	11	18	15	17
D.K.	10	13	8	4	10

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

Performance Ratings by Employment Status and Occupation

Working women and nonworking women share their perceptions of the relative performance of the four types of stores on several dimensions. However, the working woman is more favorably disposed toward specialty shops regarding the performance of sales help. She is also more opinionated on this measure than the nonworking woman. (One fifth of the nonworking women said they did not know which type of store had the best sales help.)

Working women are more favorably disposed toward specialty shops on the arrangement of the merchandise - its attractiveness and its convenience - than nonworking women are. But nonworking women - who patronize chain stores more than working women - chose the chain stores as often as department stores for conveniently arranged clothes.

Further discriminations emerge when the kind of job a woman has is taken into account. Looking first at how department stores fare vis-a-vis specialty shops, we find the following. Although department stores and specialty shops tied on "up-to-date fashions" in the over-all rankings, for the blue collar women department stores rank ahead of specialty stores in this regard. And it is only for the blue collar woman that department stores outrank specialty stores in carrying the kind of clothes she likes to wear.

In general, professional/managerial women and white collar women hold similar views of the four types of stores. The national chains are ranked similarly by women in all three occupational groups.

Performance Ratings by Employment Status and Occupation

Table 12.

	Total	Employed Women	Not Employed	Professional	White Collar	Blue Collar
	(501)	(270)	(230)	(94)	(104)	(68)
LARGEST SELECTION: Bases:	%	%	%	%	%	%
Dept. stores	47	50	44	52	49	49
Specialty	10	10	9	11	10	12
National chain	34	34	34	35	35	29
Discount	4	3	6	1	2	4
D.K.	7	5	9	2	4	7
EASIEST SHOPPING:						
Dept. stores	42	42	42	39	41	47
Specialty	25	27	23	33	30	16
National chain	26	24	27	22	24	25
Discount	8	7	8	5	7	9
D.K.	4	3	6	1	2	6
MY KIND OF CLOTHES:						
Dept. stores	41	40	43	37	39	43
Specialty	31	33	28	36	34	28
National chain	27	26	29	24	26	25
Discount	6	4	8	2	4	7
D.K.	5	4	7	4	4	4
CONVENIENTLY ARRANGED:						
Dept. stores	39	40	37	40	39	41
Specialty	22	26	18	27	28	18
National chain	29	25	35	24	24	26
Discount	7	7	8	3	7	6
D.K.	8	8	8	6	7	12
ATTRACTIVELY ARRANGED:						
Dept. stores	37	36	38	33	32	43
Specialty	37	42	32	39	46	34
National chain	21	20	22	24	20	22
Discount	2	2	1	1	2	3
D.K.	8	6	11	3	6	4
UP-TO-DATE FASHIONS:						
Dept. stores	37	40	33	38	35	33
Specialty	36	39	33	43	41	35
National chain	23	21	25	19	21	21
Discount	4	3	5	3	3	6
D.K.	8	6	10	2	5	6
HIGHEST QUALITY:						
Dept. stores	36	36	36	34	35	37
Specialty	33	35	31	38	38	26
National chain	26	24	28	20	22	29
Discount	2	2	1	3	3	1
D.K.	7	6	8	6	5	10
BEST SALESCLERKS:						
Dept. stores	30	28	31	20	29	25
Specialty	36	41	30	50	46	28
National chain	21	22	21	18	20	28
Discount	2	3	2	3	4	1
D.K.	16	11	21	12	8	19
BEST VALUE:						
Dept. stores	32	31	32	29	30	35
Specialty	10	10	10	8	10	12
National chain	35	37	33	38	36	40
Discount	15	14	16	16	16	7
D.K.	10	10	11	9	9	10

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

"What Should Department Stores Do to Make it Easier for You to Shop There?

Answers to this open-ended question do not indicate how all customers feel about various aspects of department stores, but they do provide a vivid picture of top-of-mind concerns and problems that the customer has when she is shopping in a department store.

Although as reported earlier 42% of the women said that department stores were the easiest to shop in, almost three fourths of the respondents had suggestions to make about how department stores could improve the shopping experience. The remainder (29%) had no suggestions -- either because they were satisfied or because they didn't shop in department stores enough to be able to say what would make it easier.

"They only have to open the door, I go there on my own."

"I don't have to save the money anymore. It's not worth the hassle, so they couldn't do anything to make me shop there."

Table 13.

Major Suggestions for Improving Department Stores[1]

Improve sales help/service	31%
Arrange by size/item/style	13
Bigger/better variety (more styles/sizes)	17
Lower prices/more sales	14
Physical features (lighting, elevators, etc.)	7
Base: (Total who made suggestions)[1]	71%
Nothing	13
Don't know	16

1) Other miscellaneous suggestions not shown here.

Salesclerks/Service

The single greatest source of dissatisfaction had to do with sales service: among those who made suggestions, almost one woman in three (31%) asked for improvement in the quality of service or an increase in the number of salesclerks. They wanted more help in finding the merchandise they were looking for, they wanted sales help who could provide fashion advice, they wanted polite sales help and quick service.

> "Number one is to have helpful sales people."
>
> "Have sales people who can help you, department stores don't have them."
>
> "More salesclerks to answer questions on taking things back."
>
> "More faster clerks, people who can get you out fast."
>
> "Sales help that are knowledgeable in every department."
>
> "Sales help that know about the product and that are polite."
>
> "They need more help, more individual attention for customers."
>
> "I think they should have more helpful clerks. They are very indifferent."
>
> "Make it easier to find sales help. Sometimes you're looking around and can't find anything."
>
> "Maybe if the salesclerks knew about current fashions and accessories."
>
> "Like service to be better -- more friendly. It's what I like about some other shops -- the special attention -- they help you."

Although more referred to a lack of service, a few of the women objected to being pressured into buying:

> "Well, it depends on which store you go to. I don't like pushy salespeople."
>
> "First of all, I like to look around, I always let them know when I'm ready for you I'll call you."
>
> "I think the better stores are leisurely for you -- no pressure."
>
> "They can't let you shop alone and take time to try them on, see how they look."

Organization of Store and Merchandise

One fifth of the suggestions concerned the way the departments and merchandise are arranged.[1] The sum of these suggestions indicate that women have difficulty in finding what they're looking for, and that especially in view of the deterioration in service, there is a need for clarity in the arrangement of departments and merchandise within the departments.

The range of other suggestions having to do with being able to find merchandise included the following:

Arrange the Merchandise by Size:

"The particular size that you need should be in one place and not scattered around."

"Just to have things arranged to make it easier for you to look for things you're looking for, like have dresses arranged by size, not mixed in with other sizes."

"Should have a floor for different sizes. Exclusively departments (floors) for special sizes."

"By size rather than designer."

"Centralize the sizes rather than separate shops within shops, like the designer areas."

Have All of Same Items Together:

"Organize themselves better. Everything is all over, all mixed up."

"Should separate sizes and blouses in their own department."

"Have the ladies' clothes all in one place."

"They should have all dresses in one section. All slacks in one section."

"They should have things for females all in the same area so you don't have to run all over the store."

"Put all of one type of item - shirts, etc., - all in one place. Not in six different departments."

---

1) 13% of these suggestions referred specifically to size, item, and style. The additional suggestions, originally tabulated as "miscellaneous" referred to over all department arrangements.

"Bring the department featuring all of the same items together instead of on different floors."

"With multiple racks, arranged all over the store, I can't remember what I've seen or what I want. Terribly confusing."

- Provide Signposts and Separations

"Have a big name so you can read the signs such as "Junior" so you can see them."

"Better defined area for sizes, i.e., junior, misses, tall girls, and proportions."

"Make the sizes obvious. The departments should be obviously separated. I would say have sales tables separated from regular stock."

- General Housekeeping

"I don't like sales items when they're dumped together."

"Don't have the racks so close together and don't cram the clothes. It's too hard to get anything out."

"Have the sizes where they're supposed to be. Have things neatly hung or folded."

Bigger, Better Variety of Styles and Sizes

As reported earlier, department stores are comparatively well thought of with regard to the selection of merchandise. (47% thought department stores have the biggest selection.) Nevertheless, almost one woman in six (17%) among those who made suggestions, wanted more merchandise to choose from.

"Have more clothes for older people. Most of the clothes are for younger people."

"A lot of stores should have a better assortment of sizes."

"Carry small sizes."

"More variety."

"Carry larger sizes in more fashionable styles."

"They do not carry any sizes that I wear."

"Young styles for older women."

"A bigger selection. They only have for skinny minnies."

At the same time there were a few who obviously feel overwhelmed by the masses of merchandise available in department stores, and who want the smaller boutique within the store, to approximate the specialty shop advantage:

"Not so much merchandise. Too many choices."

"Make it less overwhelming. Too large -- too confusing."

"Have more specialty shops within the store."

"They have too much. Divide the store into specialty sections. Has too much quantity."

Prices and Sales

About one woman in seven (14%) made suggestions bearing on the cost of department store merchandise: they said it would be easier to shop if the stores lowered their prices or ran more sales or had budget departments.

Other Suggestions

The remaining suggestions covered a wide miscellany of items -- from wanting stores nearer to home, or open all night, to providing wider aisles, better fitting rooms, lockers, child care, easier credit, more and better advertising, notification of sales, etc.

Only two or three women asked for alteration service and only two or three women asked for better displays of the merchandise or "showing how to wear the clothing."

Obviously, some of these suggestions are contradictory, some of them are not feasible, and some of them run counter to sound marketing decisions. But the fact that almost three out of four women came up with at least one

suggestion, and that so many of them referred to problems in finding the merchandise, because of the confusion of the arrangements and/or the inadequate service, suggests that department stores may be losing ground as an enjoyable scene for shopping.

The customers appear to recognize that department stores are changing -- indeed a few women said "stop rearranging the departments, I like things in the same place each time I go." But if these changes are to serve the customer, she needs help, either through improved personal service of some kind, or through some other method of educating or informing her about the nature of the different departments. And if the burden of finding the merchandise in the multi departments must now rest with the customer, the arrangement of the merchandise must be useful to her, and the department signposts and the labeling of the merchandise itself must be informative.

By and large, suggestions and criticisms were made by women in all segments. Those who are more affluent, the employed women, and those who made their last purchases in specialty stores were somewhat more responsive to this question. But the nature of their suggestions were remarkably uniform across the board. Criticisms of sales help came from young and old and so did criticisms of the arrangement of the merchandise. Criticism of the sales help came from employed as well as nonworking women, from professional, white collar and other types of working women, and from women who shopped in department stores as well as those who shopped in other stores. (See Appendix)

FASHION ATTITUDES

Store vs. Designer and Classic vs. the Latest Styles

When a woman buys clothes for herself many things enter into the purchase decision in addition to cost -- where and when she'll wear them, how they fit, practical considerations of durability and maintenance, and not least, how they look on her, how fashionable they are, and what image she projects.

In two recent consumer studies women were asked about the importance of various criteria when they buy clothes for themselves.[1] Both studies included "style" and in both studies a sizeable proportion of women said style was important: In the Virginia Slims study women were asked which of a list of things were important to them when buying clothes for social occasions, for leisure and for work. Style was important for clothes for social occasions but less so for casual clothes and for work, but here it must be remembered that one-third of American working women are in service or manual occupations. In the Fairchild study women said fit is the most important consideration in buying daytime dresses or a coat for dress wear. Next came quality of workmanship and fabric, followed by price and color. Style or fashion considerations followed (over one-third rated this extremely important). Brand or designer names were rated "extremely important" by only 4% of the women.

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1) 1980 Virginia Slims American Women's Opinion Poll, conducted by The Roper Organization, Inc.

The Customer Speaks, 1980, conducted by the Home Testing Institute for Fairchild Publications.

The present study focussed on two of these considerations -- style and brand or designer names -- with a different approach. The women were asked the following questions:

> "When you're buying good clothes for yourself, which is more important to you -- the fashion reputation of the store, or the name of the designer or manufacturer?"
>
> "For the same amount of money, would you rather buy ... one classic outfit that would be in style for a number of years or two or three outfits that are in the latest styles?"

Fashion Reputation of Store vs. Name of Designer or Manufacturer

Despite being faced with a forced choice question, more than one in five (22%) said "neither" and the remainder were evenly divided between the two.

Table 14.

Importance of Store vs. Brand

Fashion reputation of store is more important	36%
Name of designer or manufacturer is more important	36
Both	3
Neither	22
It depends	2
Don't know	1
	100%
Base:	(501)

The denial that either is primary was made more often by older and better educated women, by women in large metro areas and those who live in the West. (See next page.)

Among those who acknowledged the fashion authority of one or the other, professional women and women who had bought clothes in department stores or specialty stores were evenly divided between store and designer. Since these are the kinds of stores which provide both kinds of fashion authority and which advertise both, it is reasonable to find that both count to their customers. But the fact that their customers are divided suggests that these stores have not established their own primacy as fashion authority. The chain store and discount store customers were somewhat more concerned with the fashion reputation of the store. This too is understandable since these women are presumably less likely to buy even their good clothes in a price range which carries known designer or manufacturer labels.

Table 15. Importance of Store vs. Brand, By Demographic Characteristics

	Bases:	Fashion Reputation of Store	Name of Designer or Manufacturer	Both	Neither	Depends	Don't Know
TOTAL	(501)	36	36	3	22	2	1
18-34	(186)	46	37	3	13	1	0
35-54	(171)	31	37	3	26	2	1
55 or older	(136)	30	34	2	27	4	3
Single	(67)	33	43	6	15	3	0
Married	(329)	39	35	3	21	1	1
Other	(104)	31	32	1	28	6	2
High School	(274)	39	36	4	17	3	1
College	(223)	34	35	1	27	2	1
Under $15,000	(141)	40	34	1	18	4	3
$15,000-$24,999	(115)	38	35	3	22	2	0
$25,000-$34,999	(96)	40	35	2	20	2	2
$35,000 or more	(63)	35	38	0	27	0	0
Employed	(270)	36	35	3	23	2	1
Not Employed	(230)	37	36	3	19	3	2
Prof., Managerial	(94)	36	37	1	25	1	0
White Collar	(104)	44	28	5	22	1	0
Blue Collar, Service	(88)	25	43	1	24	6	1
Northeast	(112)	41	30	4	21	3	1
North Central	(130)	34	36	3	23	2	0
South	(161)	38	41	3	14	3	1
West	(98)	33	31	1	32	1	2
Non-Metro	(157)	43	32	6	16	1	2
500,000-999,999	(134)	31	45	1	19	4	0
1,000,000 or over	(210)	35	32	2	27	3	1
Dept. Store Customer 1)	(197)	35	37	4	21	3	0
Specialty Store "	(253)	35	38	2	23	2	0
Nat'l Chain Store "	(123)	46	33	2	16	1	2
Discount Store "	(80)	41	34	3	20	1	1
5,4 day newspapers	(316)	33	37	3	24	3	0
3,2,1 days newspaper	(124)	47	38	2	13	0	0
None past 5 days	(56)	32	27	5	27	5	4

1) Bought dress and/or separates in that type of store.
Not mutually exclusive, since women may have bought each item in a different store.

Style: Classic vs. Up-to-the-minute

The question about style which was asked in this study was:

> "For the same amount of money, would you rather buy . . . one classic outfit that would be in style for a number of years or two or three outfits that are in the latest style?"

Even though in asking the question we alternated the sequence of choices to control for bias, "one classic outfit" was the resounding choice of most women; only 26% claimed a preference for two or three outfits in the latest styles, at least for the same amount of money.

Table 16.
Preference for Classic Style

One classic outfit	72%
2-3 latest styles	26
Don't know	2
	100%
Base:	(501)

A majority of women in every group chose the one classic outfit, but there were some variations in the degree to which this attitude prevailed. (See Appendix.)

Table 17 presents a profile of the two groups of women. Those who prefer one classic outfit are older and better educated than those who prefer the latest styles. They are also more likely to be professional or managerial women and customers of department stores.

Those who prefer the latest styles are younger, less well educated, and more likely to be blue collar workers. They include fewer department store customers and more discount store customers than the women who prefer the one classic outfit.

Table 17.

Demographic Profiles of Women Who Prefer One Classic Outfit and Those Who Prefer 2-3 in the Latest Styles

	One Classic Outfit	2-3 Latest Styles
Age:		
18-34	35%	47%
35-54	36	30
55 +	29	23
Bases:	(355)	(128)
Education:		
High school	47%	74%
College	53	26
Bases:	(354)	(129)
Occupation:		
Prof., managerial	39%	26%
White collar	38	42
Blue collar, service	23	32
Bases:	(192)	(66)
Store Customers:		
Department stores	33%	21%
Specialty stores	40	38
National chains	17	22
Discount stores	10	19
Bases:	(467)	(176)

THE ROLE OF THE MEDIA

Three questions were asked about the role of the media for the consumer: how useful they are to her in finding out what's in fashion, which is most helpful for making up her mind about where to shop, and where she has seen ads that led to making unplanned purchases.

Keeping in Touch with Fashion

It is not surprising that magazines, a conventional source of fashion news for women, ranked first as very useful for finding out what's in fashion. What is remarkable is that newspapers play an almost equally important role in this respect: 39% of the women said magazines are extremely or very useful for finding out what's in fashion and 33% say the same of newspapers. Television was rated extremely or very useful by 21% and radio by only 6%.

Table 18.
Usefulness of Each of the Major Media
As Source of Fashion News

	Magazines	Newspapers	Television	Radio
Extremely useful	9%	7%	5%	2%
Very useful	30	26	16	4
Somewhat useful	40	42	42	28
Not at all useful	18	22	34	62
Don't know	3	3	3	4
Base:	(501)	(501)	(501)	(501)

Question: "Thinking about the different ways you keep in touch with what's in fashion, how useful are each of the following to you personally in finding out what's in fashion -- that is, extremely useful to you, very useful, somewhat useful, or not at all useful?" (RANDOM START)

Magazines are more important for fashion news to young, single, employed women. Newspapers tend to be more uniformly important across the demographic categories. For example, working and nonworking women are in more agreement about newspapers than about magazines (36% and 30% respectively rate newspapers very useful, compared with 44% and 33% for magazines). And even though newspaper readership is not strong among very young women, like older women one-third find newspapers a very good source for keeping in touch with fashion.

Expectably, newspapers are not very useful in this regard to women who have not read a newspaper in the past five days, but magazines are also less important to these same women. For the frequent newspaper reader, however, newspapers are just as important as magazines for finding out what's in fashion (38% and 40% respectively).

It should be observed that the above question did not seek to make distinctions between the types of content which inform women about what's in fashion -- advertising, fashion news articles or discussions, or simply the appearance of women in photographs or on the screen. Presumably the relative weight of each type of content would correspond to the relative content of each medium.

Table 19. Ratings of the Major Media for Usefulness in Finding out What's in Fashion by Demographic Characteristics

	% who say "extremely" or "very" useful [1]				Bases for Each Media Rating
	Magazines	Newspapers	Television	Radio	
TOTAL	39%	33%	21%	6%	(501)
18-34	43	28	19	8	(186)
35-54	40	36	26	4	(171)
55 or older	31	35	17	6	(136)
Single	48	34	19	5	(67)
Married	38	32	20	5	(329)
Other	36	38	25	10	(104)
High School	35	31	25	7	(274)
College	44	35	16	5	(223)
Under $15,000	36	33	20	8	(141)
$15,000-$24,999	42	26	20	6	(115)
$25,000-$34,999	43	41	27	6	(159)
$35,000 or more	38	39	19	3	(63)
Employed	44	36	22	6	(270)
Not Employed	33	30	20	6	(230)
Prof., Managerial	38	33	16	6	(94)
White Collar	47	35	23	4	(104)
Blue Collar, Service	44	40	30	9	(68)
Northeast	40	41	18	8	(112)
North Central	39	28	25	4	(130)
South	43	35	22	6	(161)
West	30	26	17	5	(98)
Non-Metro	41	26	22	6	(157)
50,000-$999,999	37	34	24	5	(134)
1,000,000 or over	38	38	19	5	(210)
Dept. Store Customer	41	37	17	4	(197)
Specialty Store "	44	34	21	4	(253)
Nat'l Chain Store "	38	34	25	8	(123)
Discount Store "	39	30	26	13	(80)
5,6 day newspapers	40	38	20	7	(316)
3,2,1 days newspaper	43	30	23	7	(124)
None past 5 days	27	13	20	9	(56)

1) Table showing % who say "extremely," "very" or "somewhat" useful is shown in the Appendix.

Newspaper Advertising is Most Helpful on Where to Shop

From the point of view of the retailer, advertising may be designed to get women interested in buying, but its primary purpose is to get the customer into the advertiser's store. And for this function newspaper advertising takes a strong lead over the other media. Six out of ten women (63%) said newspaper advertising was the most helpful of the four media, followed by 20% who said magazine advertising ; 14% said TV and 3% said radio.

Table 20.

Advertising Most Helpful on Where to Shop	
In newspapers	63%
In magazines	20
On television	14
On radio	3
	100%

Base: (total mentions) (466)

Question: When you're ready to buy clothes for yourself, in which one of the following do you find advertising most helpful to you in making up your mind about where to shop?
(READ LIST OF FOUR MEDIA. ROTATE START.)

Newspaper advertising is perceived as particularly helpful by the more mature, affluent woman. But even among those who are less newspaper oriented -- the young, single, low income, blue collar workers -- newspapers are the most helpful source for approximately half of the women. And in terms of the store they shop in, newspaper advertising is equally important to customers of all four types of stores.

Table 21. Advertising Most Helpful About Where to Shop
By Demographic Characteristics
(Based on total Mentions of the four major media

	None D.K.	Total Mentions	Newspapers	Magazines	TV	Radio
Total	11%	(466)	63%	20%	14%	3%
18-34	2	(192)	52	22	20	6
35-54	13	(159)	67	20	12	1
55 or older	20	(113)	74	18	7	1
Single	4	(64)	48	31	17	4
Married	10	(309)	65	19	14	2
Other	16	(94)	65	19	13	3
High School	8	(260)	60	20	17	3
College	11	(205)	65	22	11	2
Under $15,000	10	(134)	57	22	16	3
$15,000-$24,999	6	(114)	68	15	14	3
$25,000-$34,999	9	(89)	65	16	16	3
$35,000 or more	10	(57)	78	19	1	2
Employed	9	(257)	60	22	15	3
Not Employed	12	(212)	66	18	13	3
Prof., Managerial	12	(86)	65	22	12	1
White Collar	6	(102)	61	23	12	4
Blue Collar Service	9	(67)	52	22	22	4
Northeast	7	(110)	53	29	14	4
North Central	11	(124)	68	19	11	2
South	12	(147)	65	15	18	2
West	11	(87)	62	23	12	3
Non-Metro	10	(151)	57	25	17	3
$50,000-999,999	13	(122)	70	13	10	4
1,000,000 or over	9	(193)	62	25	11	2
Dept. Store Customer[1]	10	(183)	68	19	11	2
Specialty Store "	9	(238)	61	25	12	2
Nat'l Chain Store "	9	(122)	58	17	21	2
Discount Store "	9	(78)	60	18	18	4
5,4 day newspapers	9	(297)	69	19	10	2
3,2,1 days newspaper	6	(119)	56	24	16	4
None past 5 days	25	(45)	37	25	33	5

1) Bought dress and/or separates in that type of store. Not mutually exclusive, since women may have bought each item in a different store.

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

Newspaper Advertising Also Leads to Unplanned Buying

More than half of the women (56%) acknowledged that they had seen ads which had led them to buy clothes for themselves, even though they weren't planning to do so. And in seven out of ten of these purchases it was a newspaper ad which had stimulated the purchase.

Table 22.

Ads Which Stimulate Unplanned Buying

Have ads led to unplanned buying?	
Yes	56%
No	43
Don't know	1
	100%
Base:	(501)

Where ad appeared	
Newspaper	69%
Magazine	15
Television	9
Radio	1
Other	5
Don't know	2
	100%
Base:	(280)

Question: "Have you ever seen ads for clothes that led you to buy clothes for yourself, even though you weren't planning to?"

"The last time that happened, where did that ad appear? Was it . . ." (READ LIST OF FOUR MEDIA. ROTATE START.)

The unplanned purchase occurs more frequently among the 18-24, the single, and the employed. As income rises, so does the likelihood of unplanned purchases. (See p. 44.)

Newspaper ads are the stimulus for the large majority of women in almost all segments of the population. The lowest figure for newspapers occurred among blue collar women (who were less likely to make an unplanned purchase), but even there half the women (50%) said it was a newspaper ad. And even women who did not read a newspaper last week (only 46% of whom had made such a purchase) attributed their last unplanned purchase to a newspaper ad in the majority of cases. (See next page.)

Newspaper ads were equally effective among shoppers in the four types of stores. Moreover, newspaper ads appear to be equally effective among those who bought both items in the same kind of store and those who bought only one. To the extent that we can call a customer "loyal" if she made both purchases in the same kind of store, this suggests that newspaper ads are as effective with loyal customers as with customers who switch.

Table 23.

% Who Attributed Last Unplanned Purchase to a Newspaper Ad

(Based on all who had made unplanned purchase because of an ad they had seen)

		Bases:
Total	69%	(280)
Department store customers	72	(122)
Specialty store customers	70	(156)
National chain customers	67	(69)
Discount store customers	73	(44)
Bought both items in same kind of store	69	(128)
Bought only one item in a given type of store	71	(263)

Ads Leading to Unplanned Purchases, by Demographic Characteristics

Table 24.

	YES			Where Ad Appeared						NO	D.K.
	Bases:	%	Bases:	Nsp.	Mag.	TV.	Radio	Other	Don't Know	%	%
TOTAL	(501)	56%	(280)	69	15	9	1	5	2	43	1
18-24	(72)	71	(51)	59	21	12	2	4	2	29	0
25-34	(114)	59	(67)	70	12	12	3	3	1	39	2
35-44	(95)	59	(56)	68	18	9	0	5	0	40	1
45-54	(76)	53	(40)	78	13	8	3	3	0	46	1
55-64	(81)	57	(46)	67	15	9	0	9	2	43	0
65 or over	(55)	33	(18)	72	11	0	0	6	11	63	4
18-34	(186)	63	(118)	65	16	12	3	3	2	36	1
35-54	(171)	56	(96)	72	16	8	1	4	0	43	1
55 or older	(136)	47	(64)	69	14	6	0	8	5	51	2
Single	(67)	70	(47)	57	26	11	2	4	0	30	0
Married	(329)	55	(180)	69	13	10	2	5	2	44	1
Other	(104)	51	(53)	75	15	6	0	4	4	47	2
High School	(274)	55	(150)	64	15	11	2	5	3	44	1
College	(223)	57	(128)	73	16	8	1	4	1	42	1
Under $15,000	(141)	50	(70)	66	17	9	1	6	3	48	2
$15,000-$24,999	(115)	56	(64)	67	13	13	3	5	2	43	2
$25,000-$34,999	(90)	61	(59)	75	15	8	0	2	2	38	0
$35,000 or more	(63)	65	(41)	75	15	5	0	5	0	35	0
Employed	(270)	60	(163)	69	17	10	2	2	2	39	1
Not Employed	(230)	50	(116)	67	13	8	1	9	2	48	2
Prof., Managerial	(94)	64	(60)	77	18	5	2	0	2	35	1
White Collar	(104)	62	(64)	74	9	9	2	3	3	37	1
Blue Collar, Service	(68)	53	(36)	50	28	19	3	3	0	47	0
Northeast	(112)	56	(63)	54	25	6	3	10	2	42	2
North Central	(130)	55	(71)	76	13	6	3	3	1	45	0
South	(161)	60	(97)	69	12	13	0	4	2	38	2
West	(98)	50	(49)	76	12	10	0	2	2	49	1
Non-Metro	(157)	57	(90)	66	18	9	0	7	3	41	2
50,000-999,999	(134)	56	(75)	73	5	17	1	4	0	44	0
1,000,000 or over	(210)	55	(115)	68	20	4	3	3	2	44	1
Dept. Store Customer 1)	(197)	62	(122)	72	14	9	1	5	2	36	2
Specialty Store "	(253)	62	(156)	70	17	9	1	4	1	37	1
Nat'l Chain Store "	(123)	56	(69)	67	13	13	2	4	1	43	1
Discount Store "	(80)	55	(44)	73	7	11	2	2	5	44	1
5,4 day newspapers	(316)	56	(175)	71	13	10	0	4	2	43	1
3,2,1 days newspaper	(124)	63	(78)	67	17	8	5	5	1	36	1
None past 5 days	(56)	46	(26)	57	27	8	0	8	0	52	2

1) Bought dress and/or separates in that type of store. Mutually exclusive, since women may have bought each item in a different store.

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

To summarize, newspapers have the unique ability of serving to keep women in touch with fashion and to engage customers for retail stores. They run a close second to magazines in communicating fashion news and they are far ahead in telling women where to shop and in stimulating unplanned purchases.

Table 25.

Summary Table: Role of the Media

	Newspapers	Magazines	TV	Radio
	%	%	%	%
Very useful for finding out what's in fashion.....	33	39	21	6
Very or somewhat useful....	75	79	63	34
Most helpful about where to shop.....	63	20	14	3
Ads which led to last unplanned purchase.....	69	15	9	1

APPENDIX A: A Review of Clothes Buying and Fashion Attitudes Related to Women's Occupation, 1971, 1979 and 1981.

It is no longer news that a large proportion of American women have jobs outside the home; a recent count indicates that 42,835,000 women and older are in the civilian work force -- 52% of all women 18 and over.[1] This radical change of the past decade introduced employment status as a major demographic characteristic in the study of women's attitudes and behavior. It has also led to studying the difference between career women and those for whom the job itself is less motivating, and between housewives who plan to work and those who do not. But in studying women's clothes-buying attitudes and behavior it is particularly important to consider what kind of jobs women hold since the milieu of the professional or managerial woman differs somewhat from that of the white collar worker, and since both differ from that of the blue collar or service worker.

The retail fashion industry has kept up with the times by addressing itself to the working woman,[2] but it has concerned itself in the main with the 24% who are professional or managerial, and the 42% who hold clerical or sales jobs -- the latter either directly or indirectly on the assumption that they model themselves after their more successful sisters. But the female work force is more diverse than that, since it includes 34% who are in manual or service occupations. And it is suggested that the retailer can profit from studying this segment as well.

Occupation of Employed Women in 1980

Professional, technical, managerial	24%
Clerical	35
Sales	7
Blue collar	14
Service	19
Farm	1

Source: U.S. Dept. of Labor

1) Source: U.S. Dept. of Commerce, Labor

2) The term "working" and "nonworking" women are used only to differentiate those in the labor force from those who are not.

Following is a review of the findings of two previous NAB studies of women, followed by profiles of women in various employment categories derived from the present study.

The 1979 NAB study, Women, Work, and Markets of the '80s, traced changes from a similar study in 1971 in attitudes and activities among working and nonworking women. It found that both kinds of women had changed in certain respects that are relevant to the present study of women and apparel.

Images: The working woman was seen in very positive terms by nonworking women as well as working women themselves in both studies, but there were some differences and some changes. In both studies working women, especially professional and white collar, characterized themselves as "feminine" to a greater extent than nonworking women did. (That is, not as many nonworking women thought working women were feminine.) And nonworking women were more inclined to think of the working woman as "big spenders" than working women were of themselves, although the difference was smaller in 1979.

In 1971 over half the women, working and nonworking, characterized the working woman as liking to shop for clothes, but fewer of both kinds of women held this to be true in 1979. (This image was strongest among white collar workers.) In both studies "liking to shop for clothes" was considered less descriptive of nonworking women, by nonworking as well as working women.

Working Women and Full-Time Housewives
As Described by Working and Nonworking Women

"A Working Woman"	Nonworking Women		Working Women		Working Women 1979		
	1971	1979	1971	1979	Prof.	White Collar	Blue Collar
Feminine	37%	34%	47%	47%	54%	53%	40%
Big spender	24	16	16	12	10	12	12
Likes shopping for clothes	52	43	53	44	43	50	40
"A Full-Time Housewife"							
Feminine	44	43	46	41	46	45	37
Big spender	10	5	9	8	8	8	8
Likes shopping for clothes	37	26	36	31	35	37	26
	(339)	(305)	(661)	(736)	(166)	(250)	(306)

The way women feel about how the media portray them may also be taken as a dimension of their self-image. In the 1979 study working women and nonworking women were far more satisfied by the portrayal of women in newspaper ads than in television. Greater satisfaction with newspaper advertising was true even of blue collar women who were less critical of television advertising than other working women were.

Does Newspaper and Television Advertising Present Women the Way They Should be? - 1979

	Nonworking Women	Working Women	Prof./ Mng.	White Collar	Blue Collar
Newspaper Advertising:					
As they should be	51%	46%	40%	48%	47%
As they should not be	23	36	46	39	28
Don't know	26	18	14	13	25
Television Advertising:					
As they should be	32%	30%	25%	26%	35%
As they should not be	51	59	67	64	51
Don't know	17	11	8	10	14
Bases:	(305)	(736)	(166)	(250)	(306)

Clothes for Work: Except for manual workers the majority of employed women said "I have work in mind when I buy most of my clothing." However, there was a drop between 1971 and 1979 in the percentage of professional women who said they bought more clothes and shoes because of work. (In 1971, 53% of the professional/managerial women said they bought more clothing because of work, but by 1979 this percentage dropped to 40%.) Furthermore, the number of professional/managerial women who said "I am expected to dress well where I work" dropped from 52% to 37%. And the proportion of manual workers who said "I am expected to wear a uniform or work clothes" dropped from 45% to 33%. Taken together these findings suggest a greater tolerance of personal standards in dress and working women, and less discrimination between clothes for work and clothes for other situations.

Work Oriented Shopping for Clothes
(by Occupation)

	Professional/ Managerial		Clerical/ Sales		Service/ Manual	
	1971	1979	1971	1979	1971	1979
"I have work in mind when I buy most of my clothes."	54%	53%	55%	52%	26%	20%
"I buy more clothes because of work."	53	40	41	42	21	21
"I buy more shoes because of work."	46	32	31	26	25	20
"At work I wear a uniform or work clothes of some kind."	24	21	13	13	45	33
"I am expected to dress well where I work."	52	37	49	42	19	14
Base:	(153)	(166)	(250)	(250)	(252)	(306)

Question: Which of the statements on this card apply to you?

Shopping Patterns: In both studies, clothes shopping by working and nonworking women was reported as overwhelmingly an in-store activity. This was especially true of professional women.

Past Month Clothes Shopping by Mail or Telephone

	Nonworking Women		Working Women		Working Women, 1979		
	1971	1979	1971	1979	Prof.	White Collar	Blue Collar
# of times shopped by mail or telephone:							
1 or more	10%	10%	11%	15%	12%	17%	15%
None	90	89	89	85	88	83	85
Base:	(242)	(305)	(509)	(736)	(166)	(250)	(306)

In both studies, working women were far more likely to have made a shopping trip in the past month, and they had done so more frequently than had those nonworking women who had shopped. White collar women shopped most frequently.

Past Month Shopping for Clothes at Stores, 1971-1979

	Nonworking Women		Working Women		Working Women, 1979		
	1971	1979	1971	1979	Prof.	White Collar	Blue Collar
# of times went shopping in stores:							
4 or more	20%	16%	27%	26%	23%	31%	22%
2-3	19	23	29	29	31	28	28
Once	17	20	15	22	23	21	22
None	44	40	28	24	23	20	28
Base:	(242)	(305)	(509)	(736)	(166)	(250)	(306)

By 1979 the nonworking women as well as the working women were more likely than before to shop for clothing at a particular time of day. The percent who said no particular time of day dropped from 24% to 16% among working women, and from 36% to 20% among nonworking women. Among the working women there was an increase in evening shopping. Among nonworking women the largest increase was in afternoon shopping. Compared to all other women, employed or not, white collar women were most prone to evening shopping (29%).

Time of Day for Clothes Shopping, 1971-1979

	Nonworking Women		Working Women		Working Women, 1979		
	1971	1979	1971	1979	Prof.	White Collar	Blue Collar
Time of Day							
Morning	22%	28%	19%	17%	14%	18%	18%
Midday (Noon-3pm)	18	17	18	19	22	22	17
Afternoon (3-6pm)	12	23	24	22	23	18	24
Evening	7	11	14	25	23	29	21
No particular time	36	20	24	16	16	12	18
DK/NA	5	1	1	1	2	1	2
Base:	(242)	(305)	(509)	(736)	(166)	(250)	(306)

The Present Study (1981)

This analysis by the occupation of working women casts light on findings in the present study as well. At the beginning of the present report it was stated that department stores had dropped out of their leadership position as the kind of store where women buy dresses. In 1971 and 1979 department stores held the lead for working women and nonworking women; in 1981 fewer women, working or not, had bought their last dress in a department store. But the movement toward specialty stores was most marked among blue collar women. The proportion who reported buying their last dress in a specialty store rose from 21% in 1979 to 35% in 1981. And the proportion of blue collar women who reported buying their last dress in a department store dropped from 37% to only 21%, which suggests that the disappearance of budget shops from department stores has driven the working class woman to her own class of specialty store.

Where Last Dress Was Bought, 1979-1981
According to Occupation

	Employment Status				Occupation					
	Nonworking Women		Working Women		Prof.		White Collar		Blue Collar	
	1979	1981	1979	1981	1979	1981	1979	1981	1979	1981
Department store	38	26	40	31	44	35	43	35	37	21
Specialty store	30	32	28	36	31	37	33	35	21	35
National chain	11	17	14	13	10	13	12	11	19	16
Discount	10	10	10	9	8	6	7	7	14	15
All others/don't know	11	15	8	12	8	8	5	14	10	13
Bases:	(305)	(230)	(736)	(270)	(166)	(94)	(250)	(104)	(306)	(68)

APPENDIX B: Additional Tables

Most Recent Dress Purchase, by Demographic Characteristics

		Dept. Store	Spec. Store	Nat'l Chain Store	Discount Store	Other	Don't Know
TOTAL	(501)	29	34	15	9	7	6
18-34	(186)	27	35	16	9	5	6
35-54	(171)	27	37	13	12	5	5
55 or older	(136)	29	29	14	6	14	7
Single	(67)	27	46	9	6	4	7
Married	(329)	29	33	16	10	6	6
Other	(104)	26	32	13	9	13	7
High School	(274)	23	33	15	12	9	8
College	(223)	35	36	13	5	6	4
Under $15,000	(141)	28	23	16	12	13	9
$15,000-$24,999	(115)	28	34	20	10	8	1
$25,000 -34,999	(96)	22	45	16	9	4	9
$35,000 or more	(63)	40	37	8	6	4	6
Employed	(270)	31	36	13	9	5	7
Not Employed	(230)	26	32	17	10	9	6
Prof., Managerial	(94)	35	37	13	6	4	4
White Collar	(104)	35	35	11	7	5	9
Blue Collar, Service	(68)	21	35	16	15	5	7
Northeast	(112)	30	35	10	9	8	8
North Central	(130)	28	38	18	8	5	4
South	(161)	26	33	17	9	9	6
West	(98)	32	31	11	11	8	7
Non-Metro	(157)	17	38	17	10	10	8
50,000- 999,999	(134)	28	34	17	7	7	5
1,000,000 or over	(210)	37	31	11	9	5	6
Dept. Store Customer 1)	(197)	73	18	4	3	2	2
Specialty Store "	(253)	15	68	6	3	2	6
Nat'l Chain Store "	(123)	11	18	59	4	3	5
Discount Store "	(80)	9	14	14	56	5	3
5,4 day newspapers	(316)	31	36	13	8	5	5
3,2,1 days newspaper	(124)	25	35	18	9	7	6
None past 5 days	(56)	23	18	16	14	18	11

1) Bought dress or separates in that type of store.
Not mutually exclusive, since women may have bought each item in a different store.

Most Recent Separates Purchase, by Demographic Characteristics

		Dept. Store	Spec. Store	Nat'l Chain Store	Discount Store	Other	Don't Know
TOTAL	(501)	26	35	16	12	8	4
18-34	(186)	22	42	16	13	4	3
35-54	(171)	31	28	20	12	6	3
55 or older	(136)	26	35	12	10	14	5
Single	(67)	25	51	12	4	4	3
Married	(329)	26	32	19	13	7	3
Other	(104)	25	36	11	12	13	5
High School	(274)	19	34	18	15	9	4
College	(223)	34	36	13	9	3	4
Under $15,000	(141)	23	35	16	12	9	4
$15,000-$24,999	(115)	21	31	18	18	8	3
$25,000 -34,999	(96)	29	36	17	13	3	2
$35,000 or more	(63)	38	37	14	3	4	5
Employed	(270)	29	36	16	11	5	3
Not Employed	(230)	23	34	17	12	10	4
Prof., Managerial	(94)	37	33	18	6	3	2
White Collar	(104)	29	40	12	12	4	4
Blue Collar, Service	(68)	18	32	19	19	10	1
Northeast	(112)	29	34	15	11	10	1
North Central	(130)	28	32	20	9	6	5
South	(161)	22	37	14	15	8	4
West	(98)	27	38	15	11	4	5
Non-Metro	(157)	13	34	24	15	11	3
50,000-999,999	(134)	28	35	14	14	6	3
1,000,000 or over	(210)	34	36	11	8	5	5
Dept. Store Customer 1)	(197)	66	19	7	4	4	2
Specialty Store "	(253)	14	70	9	4	1	2
Nat'l Chain Store "	(123)	6	13	66	9	7	-
Discount Store "	(80)	8	10	6	74	2	-
5,4 day newspapers	(316)	31	34	16	11	7	3
3,2,1 days newspaper	(124)	16	38	21	15	6	3
None past 5 days	(56)	21	38	7	13	17	5

1) Bought dress or separates in that type of store.
Not mutually exclusive, since women may have bought each item in a different store.

Bought Both (Last Dress & Separates) in Same Kind of Store
by Demographic Characteristics

		Dept. Store	Spec. Store	Nat'l Chain Store	Discount Store
TOTAL	(501)	15	19	6	5
18-34	(186)	12	20	6	5
35-54	(171)	17	18	8	6
55 or older	(136)	16	18	4	2
Single	(67)	12	30	6	1
Married	(329)	16	17	8	6
Other	(104)	15	18	2	4
High School	(274)	11	18	6	6
College	(223)	20	20	6	3
Under $15,000	(141)	16	14	6	4
$15,000-$24,999	(115)	12	17	10	10
$25,000-34,999	(96)	10	19	5	4
$35,000 or more	(63)	24	24	5	2
Employed	(270)	17	19	6	5
Not Employed	(230)	13	19	7	4
Prof., Managerial	(94)	21	17	6	4
White Collar	(104)	19	21	3	4
Blue Collar, Service	(68)	10	18	9	9
Northeast	(112)	19	21	6	3
North Central	(130)	15	18	10	4
South	(161)	12	20	5	6
West	(98)	16	14	3	7
Non-Metro	(157)	8	21	10	6
50,000-999,999	(134)	12	16	4	5
1,000,000 or over	(210)	23	19	4	4
Dept. Store Customer 1)	(197)	39			
Specialty Store "	(253)		37		
Nat'l Chain Store "	(123)			28	
Discount Store "	(80)				30
5,4 day newspapers	(316)	18	20	5	5
3,2,1 days newspaper	(124)	9	19	9	4
None past 5 days	(56)	13	13	4	7

1) Bought dress or separates in that type of store.
Not mutually exclusive, since women may have bought each item in a different store.

Major Consumer Suggestions for Department Stores
How to Make Shopping Easies for Her[1]

	Total Who Made Suggestions	Better Sales Help	Better Arrangement By Item	Better Arrangement By Size	More Styles, Sizes	Lower Prices, More Sales
	%	%	%	%	%	%
Total	71	31	10	8	17	14
18-34	74	31	11	7	19	18
35-54	73	29	7	5	18	12
55 +	68	32	12	15	15	10
Employed	75	31	11	9	17	15
Prof., Mng.	75	31	10	3	20	15
White Collar	75	32	12	8	17	16
Blue Collar, Service	77	29	5	17	13	9
Not Employed	68	29	7	6	18	15
Under $15,000[2]	68	32	6	6	19	10
$15,000-$24,999	73	27	12	7	18	27
$25,000+	75	33	11	8	16	11
Dept. Store Customers[3]	72	32	8	8	17	13
Specialty Store Customers	80	29	11	11	18	14
National Chain Customers	69	32	10	9	22	17
Discount Store Customers	72	26	7	6	28	19

1) Based on those who made suggestions, miscellaneous other suggestion not shown here.

2) Household income.

3) Overlapping categories.

One Classic Outfit vs. 2-3 Latest Styles, by Demographic Characteristics

		One Classic Outfit	2-3 in the Latest Styles	Don't Know
TOTAL	(501)	72	26	2
18-34	(186)	66	33	3
35-54	(171)	76	22	1
55 or older	(136)	75	21	2
Single	(67)	63	36	1
Married	(329)	71	26	3
Other	(104)	78	19	3
High School	(274)	61	35	4
College	(223)	84	15	1
Under $15,000	(141)	71	26	3
$15,000-$24,999	(115)	70	29	1
$25,000-34,999	(96)	71	28	1
$35,000 or more	(63)	81	16	3
Employed	(270)	72	25	3
Not Employed	(230)	71	27	2
Prof., Managerial	(94)	80	18	2
White Collar	(104)	69	27	4
Blue Collar, Service	(68)	66	31	3
Northeast	(112)	73	25	2
North Central	(130)	70	26	2
South	(161)	71	25	4
West	(98)	70	29	1
Non-Metro	(157)	71	28	1
50,000-999,999	(134)	72	26	2
1,000,000 or over	(210)	72	24	4
Dept. Store Customer 1)	(197)	79	19	2
Specialty Store "	(253)	73	26	1
Nat'l Chain Store "	(123)	66	32	2
Discount Store "	(80)	56	43	1
5,4 day newspapers	(316)	75	23	2
3,2,1 days newspaper	(124)	64	34	2
None past 5 days	(56)	68	25	7

1) Bought dress or separates in that type of store.
Not mutually exclusive, since women may have bought each item in a different store.

Ratings of the Major Media for Usefulness in Finding out What's in Fashion by Demographic Characteristics

	% Who say "extremely," "very," or "somewhat," useful [1]				Bases for Each Media Rating
	Magazines	Newspapers	Television	Radio	
TOTAL	79%	75%	63%	34%	(501)
18-34	88	72	71	42	(186)
35-54	81	82	59	31	(171)
55 or older	66	73	57	29	(136)
Single	87	76	70	39	(67)
Married	80	76	63	34	(329)
Other	72	74	58	31	(104)
High School	74	75	62	37	(274)
College	86	75	63	30	(223)
Under $15,000	72	71	63	33	(141)
$15,000-$24,999	83	76	62	39	(115)
$25,000-$34,999	85	76	70	40	(96)
$35,000 or more	84	85	57	25	(63)
Employed	84	77	63	34	(270)
Not Employed	75	73	62	34	(230)
Prof., Managerial	87	75	55	30	(94)
White Collar	82	79	68	35	(104)
Blue Collar, Service	81	78	67	38	(68)
Northeast	83	82	60	33	(112)
North Central	79	76	64	35	(130)
South	78	76	68	39	(161)
West	78	65	54	25	(98)
Non-Metro	76	75	61	38	(157)
50,000-$999,999	82	75	68	33	(134)
1,000,000 or over	80	76	61	30	(210)
Dept. Store Customer [2]	85	79	60	26	(197)
Specialty Store "	80	78	63	32	(253)
Nat'l Chain Store "	77	72	74	44	(123)
Discount Store "	74	70	66	40	(80)
5,4 day newspapers	80	79	63	34	(316)
3,2,1 days newspaper	85	77	67	42	(124)
None past 5 days	64	54	50	25	(56)

1) Table 19 shows % who say "extremely," or "very " useful.

2) Bought dress and/or separates in that type of store. Not mutually exclusive, since women may have bought each item in a different store.

APPENDIX C: Technical Appendix
(ORC Caravan Express)

Caravan Express Telephone Sampling Methodology

The essential characteristic of probability sampling is that, for each household in the universe under study, the probability that it will be included in the sample can be specified. This means that the degree of reliability of any finding from a study based on a probability sample can be estimated mathematically.

The sample design used for Caravan Express surveys is a major improvement over other standard methods which involve selecting listed phone numbers and then changing the last digit or two. This method suffers from defects which do not allow it to be strictly called a probability sample. One problem is that it is more likely for listed phone numbers, or unlisted numbers in close proximity to listed numbers, to be reached. Another problem involves the difficulty of maintaining up-to-date telephone directories.

The new sampling plan used to generate the sample for Caravan Express surveys is Two-Stage Random-Digit Dialing. This design gives all household telephones, both listed and unlisted, an equal probability of selection and minimizes the number of calls to nonresidential telephones.

This sampling procedure requires two stages, because instead of generating complete numbers at random, we generate a bank of numbers, then sample again within this bank.

The first step in this procedure is to list all possible area codes and three-digit prefixes for the continental United States. ORC obtains this list from AT&T on a computer tape every six months.

From these six-digit numbers we randomly generate, with replacement, complete telephone numbers by adding four-digit random numbers to the area code-prefix combinations.

Each telephone number generated will be used to define a bank of 500 numbers, which is used as a Primary Sampling Unit (PSU). For example, if the number 609-924-5968 had been generated, the corresponding PSU would be all numbers between 609-924-5500 and 609-924-5999.

The initial telephone number used to define a PSU is called and, if the number is a residential number, then the entire bank of 500 numbers is retained. If it is a nonworking or business listing, then the PSU is discarded. Therefore, we are selecting PSU's with probability proportional to the number of residential phones.

The second stage of sampling is conducted within each PSU chosen by the above procedure. This stage consists of randomly, without replacement, drawing a sample of telephone numbers. At this stage it is expected that over 60 % of the telephone numbers will be residential. The 60% residential is derived from a number of ORC and non-ORC studies. Even though these studies have mostly used PSU's of 100 telephone numbers, it is reasonable to assume that the results for PSU's of 500 will not be different.

To ensure that the sample is distributed properly, the two-stage procedure is conducted within each census region. This stratified sample is distributed proportionally to the number of households in each region.

A major advantage of this two-stage sampling plan is that a given telephone sample will contain more current numbers than are reachable by using the random increment approach.

Upon reaching the household to be interviewed, the person answering the phone is interviewed, providing he/she meets the age requirement of 18 or over and falls within the sample quota of 50% male and 50% female.

The sampling procedure is rigorous in concept and practice, and allows for the exact determination of the statistical precision of any finding.

APPENDIX D: Questionnaire

SECTION B
WOMEN ONLY

Now I'd like to ask you some questions about clothes and clothes shopping.

B1. Where did you buy your last dress? (What was the name of the store?)

_____ ☐
(Name of Store)

B2. Where did you buy your last separates, like jacket, skirt, or pants? (What was the name of the store?)

_____ ☐
(Name of Store)

B3. Thinking about the different kinds of stores that sell clothes for women, that is, department stores, discount stores, speciality shops, and national chains like Sears, Penney and Ward, which kind of store would you say:

ROTATE START

	Dept. Store	Dis-count	Speci-alty	Nat'l Chain	DON'T KNOW
a. Has the highest quality of clothes for women?	1	2	3	4	5
b. Gives the best value in women's clothes for the money?	1	2	3	4	5
c. Has the largest selection of women's clothes?	1	2	3	4	5
d. Has the most knowledgeable and helpful sales clerk?	1	2	3	4	5
e. Has the kind of clothes you like to wear?	1	2	3	4	5
f. Has the most up-to-date women's fashions?	1	2	3	4	5
g. Has the women's clothes arranged most attractively?	1	2	3	4	5
h. Has the women's clothes arranged most conveniently for you?	1	2	3	4	5
i. Is the easiest kind of store for you to shop in for clothes for yourself?	1	2	3	4	5

B4. What should department stores do to make it easier for you to shop for your clothes there?

_____

_____

_____ ☐☐

B5. When you're buying good clothes for yourself, which is more important to you -- the fashion reputation of the store, or the name of the designer or manufacturer?

1 FASHION REPUTATION OF STORE
2 NAME OF DESIGNER OR MANUFACTURER
3 BOTH
4 NEITHER
5 IT DEPENDS
6 DON'T KNOW

B6. For the same amount of money, would you rather buy...

ROTATE START

1 One classic outfit that would be in style for a number of years or
2 Two or three outfits that are in the latest styles?
3 DON'T KNOW (DO NOT READ)

87. Thinking about the different ways you keep in touch with what's in fashion, how useful are each of the following to you personally in finding out what's in fashion -- that is, extremely useful to you, very useful, somewhat useful, or not at all useful: (RANDOM START)

For instance, is (READ ITEM) extremely useful to you personally in finding out what's in fashion, very useful, somewhat useful, or not at all useful?

	Extremely	Very Useful	Somewhat	Not At All	DON'T KNOW
a. What you see or hear on television	1	2	3	4	5
b. What you see or read in newspapers	1	2	3	4	5
c. What you see or read in magazines	1	2	3	4	5
d. What you hear on the radio	1	2	3	4	5
e. Store catalogs	1	2	3	4	5
f. Window shopping	1	2	3	4	5
g. Going to fashion shows	1	2	3	4	5
h. Conversations with people you know	1	2	3	4	5
i. Seeing what other women are wearing	1	2	3	4	5

88. When you're ready to buy clothes for yourself, in which one of the following do you find advertising most helpful to you in making up your mind about where to shop? (READ LIST. ROTATE START.)

1 ON TELEVISION
2 IN NEWSPAPERS
3 IN MAGAZINES
4 ON THE RADIO
5 NONE
6 DON'T KNOW

DO NOT READ

B9. Have you ever seen ads for clothes that led you to buy clothes for yourself, even though you weren't planning to?

1 YES
2 NO
3 DON'T KNOW → SKIP TO Q.B11

IF YES TO Q.B9, ASK:

B10. The last time that happened, where did that ad appear? Was it...(READ LIST. ROTATE START.)

1 ON TELEVSION
2 IN NEWSPAPERS
3 IN MAGAZINES
4 ON THE RADIO
5 NONE
6 DON'T KNOW → DO NOT READ

B11. On how many of the last five weekdays did you read a daily newspaper?

1 ONE
2 TWO
3 THREE
4 FOUR
5 FIVE
6 NONE
7 DON'T KNOW

SECTION S

(ORC Demographic Questions)

Now, just a few questions for background purposes.

S1. Are you currently...?

1 Employed full time
2 Employed part time
3 Not employed → SKIP TO Q.S3

IF "1" OR "2" ON Q.S1, ASK:

S2. What is your occupation? (REFER TO OCCUPATION CODE)

1 White collar--professional, managerial, owner
2 White collar--sales, clerical
3 Blue collar--craftsmen/foremen
4 Blue collar--semiskilled, unskilled
5 Service worker
6 OTHER (Specify):_____

S3. What is your current marital status. Are you...?

1 Married
2 Living as married
3 Single and never been married
4 Divorced
5 Separated
6 Widowed

S4. Altogether, including you and any others, how many people regularly live in this household?

1 ONE → SKIP TO Q.S7
2 TWO
3 THREE
4 FOUR
5 FIVE
6 SIX
7 SEVEN
8 EIGHT
9 NINE
10 TEN OR MORE

IF MORE THAN ONE PERSON ON Q.S4, ASK:

S5. Are there any children living in your household under 12 years of age?

1 YES
2 NO
3 DON'T KNOW

S6. Are there any children living in your household aged 12 through 17?

1 YES
2 NO
3 DON'T KNOW

S7. What was the last grade in school you completed?

1 8TH GRADE OR LESS
2 HIGH SCHOOL INCOMPLETE (GRADES 9, 10, 11)
3 HIGH SCHOOL COMPLETE (GRADE 12)
4 SOME COLLEGE
5 COLLEGE GRADUATE
6 POSTGRADUATE WORK
7 PROFESSIONAL/TECHNICAL SCHOOL
8 REFUSED

S8. What is your age?

1 18-20
2 21-24
3 25-29
4 30-34
5 35-39
6 40-44
7 45-49
8 50-54
9 55-59
10 60-64
11 65 OR OLDER
12 REFUSED

S9. Are you white, black or some other race?

1 WHITE
2 BLACK
3 OTHER
4 REFUSED

S10. Was your <u>total</u> household income <u>before</u> taxes for <u>1980</u> less than $25,000 or $25,000 or more?

1 LESS THAN $25,000 → Was that . . .? (READ CHOICES)

1 UNDER $7,000
2 $7,000 BUT LESS THAN $10,000
3 $10,000 BUT LESS THAN $15,000
4 $15,000 BUT LESS THAN $20,000
5 $20,000 BUT LESS THAN $25,000

2 $25,000 OR MORE → Was that . . . ? (READ CHOICES)

6 $25,000 BUT LESS THAN $30,000
7 $30,000 BUT LESS THAN $35,000
8 $35,000 BUT LESS THAN $50,000
9 $50,000 OR MORE

3 DON'T KNOW/REFUSED

THANK RESPONDENT AND END INTERVIEW.

Note: Sex was recorded at the beginning of the interview.

METHODOLOGICAL NOTE

The following tables are provided for the reader who is interested in obtaining a quick estimate either of the stability of a given percentage or of the significance of the difference between two percentages.

Confidence Intervals for a Given Percentage
(at the 95% confidence level)

N (Base for %)	Reported Percentage 10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	2.6	3.5	4.0	4.3	4.4
250	3.7	5.0	5.7	6.1	6.2
200	4.2	5.5	6.3	6.8	6.9
150	4.8	6.4	7.3	7.8	8.0
100	5.9	7.8	9.0	9.6	9.8
50	8.3	11.1	12.7	11.6	13.9
25	11.8	15.7	18.0	19.2	19.6

Example: If a report shows that 20% of all respondents (when N = 500) answer in a particular way, the chances are about 95 out of 100 that the true value is 20% or - 3.5%, that is, that the range 23.5%-16.5% contains the true value.

Significance of Differences Between Percentages
(95% confidence level)

Average of the Base of Percentages Being Compared	Average of Reported Percentages 10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	3.7	4.9	5.7	6.1	6.2
250	5.2	7.1	8.1	8.6	8.8
200	5.9	7.8	8.9	9.6	9.8
150	6.8	9.1	10.3	11.0	11.3
100	8.3	11.0	12.7	13.6	13.9
50	11.7	15.7	18.0	19.2	19.7
25	16.7	22.2	25.2	27.2	27.7

Example: A report shows that 33% of all respondents from 30 to 39 years of age use a certain product and that only 27% of all respondents in the 40-to-49 age group use that product. Could this difference be due to chance?

In this example assume an average base of 500 for the represented percentages. The average of the percentages (33 + 27) equals 30% and the difference between the percentages is 6%.

Since 6% is greater than 5.7 (the figure in the table for this base and percentage) the chances are about 95 out of 100 that the product is used more by the 30-39 age group.

The table values are based on an assumption of simple random sampling. The figures may be too large if a stratified sampling technique was used and probably are too small if a cluster sampling technique was utilized. (For formulas used, see McNemar, Psychological Statistics, pages 54, 60.) The second table should be used with extreme caution if the bases being averaged are very different.